



Lync User Guide

Macintosh

May 2015

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Introduction




Microsoft Lync facilitates real-time, online communication and collaboration through instant messaging (IM) and Presence, which is an indicator of a user's availability to communicate.

Use Lync to collaborate with multiple contacts within the same IM, conduct multiple IMs at the same time, customize your Presence information, send and receive files via IM conversations, call a contact using your computer's audio, and share your desktop, program, or video with contacts.

The instructions that follow refer to Macintosh Lync 2011.

Starting Lync

1. Establish your VPN connection.
2. Launch Microsoft Lync 2011 from the toolbar: 
3. In the **Email Address** field, enter your SIP address. To find the SIP address:

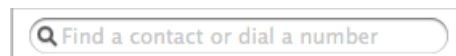
Open **Outlook** | Click **Contacts Search** | In the search field, type your last name, first name | Change the menu item from **All Folders** to **NASA Directory** | Select your name from the list and double-click your picture | When the **Properties** window appears, click the **Details** tab and scroll down to **Proxy Addresses**. SIP address is listed there.

4. The **Sign in as** field is set to **Automatic** by default. Do not change.
5. In the **User ID** field, enter your NDC network name | In the **Password** field, enter your NDC network password.
6. Click **Sign In**. The Lync 2011 application screen displays.



Lync Contacts

To locate a contact, use one of these methods:

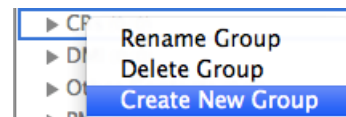


- Enter a name in the text box and all matches appear.
- Alternatively, you can organize your contacts into groups (see below), allowing you to find someone with just a couple of clicks, rather than having to type in a name.

Create Groups

Create groups so that you can organize your contacts for easier viewing. It also allows you to quickly send individual or group messages. To create a Lync group in Macintosh:

1. Ctrl+click on a group name, such as **Favorites**.
2. Select **Create New Group**.
3. In the text box that appears, enter a meaningful group name.



The new group name now appears in the group list.

4. Repeat these steps until you have added all your groups.

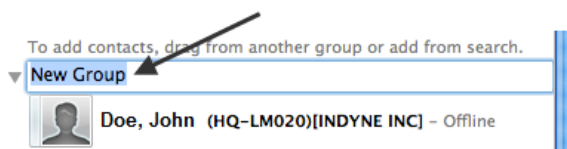
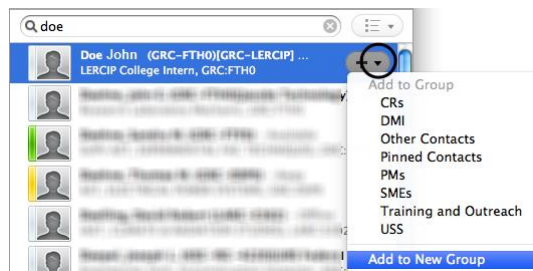
You are now ready to populate these groups with contacts. You can do this in various ways. See the Add Contact to Group in Macintosh section below.

Add Contact to Lync Group

After you have created your groups, as described above, use one of the following methods to add contacts to these groups.

Method One: + Menu

1. Search for a contact and select the name in the search results | Click the + menu as shown right.
2. Either select an existing group, or select **Add to New Group**.
3. In the **New Group** text box that appears above the contact, enter a meaningful group name.



The new group name now appears in the group list.

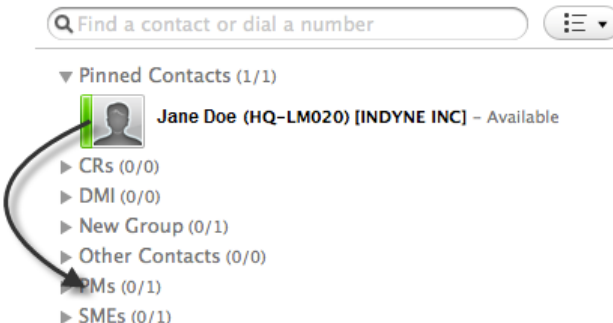
4. Continue to add contacts using any of the methods described.

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Method Two: Drag and Drop

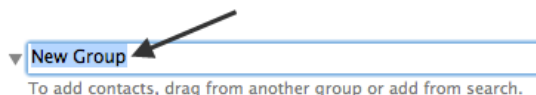
Click on one of your existing contacts | Drag it to the group where you want it to reside.

In the example at the right, Jane Doe was added as a contact. She can be dragged into any of the existing groups.

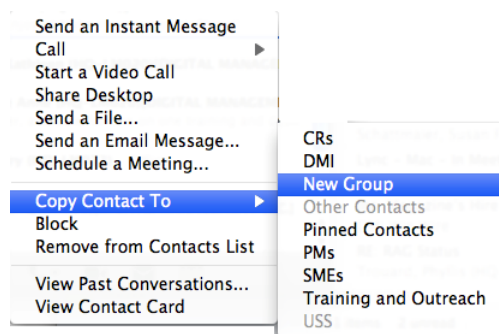


Method Three: Ctrl+Click Existing Contact

1. Ctrl+click on existing contact name.
2. Select **Copy Contact To** | Either select an existing group, or select **New Group**.
3. In the text box that appears, enter a meaningful group name.



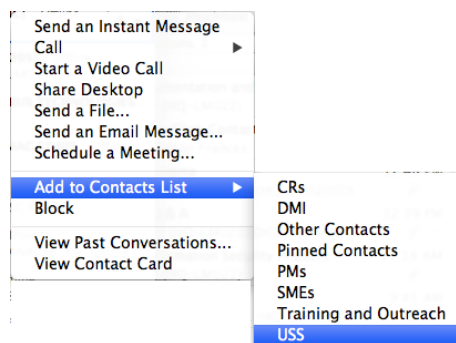
The new group name now appears in the group list.



Method Four: Ctrl+Click Search Name

To add someone to a group who is not yet a contact:

1. Search for a contact and Ctrl+click on the name in the search results.
2. Select **Add to Contacts List** | Select the group you wish to add them to.



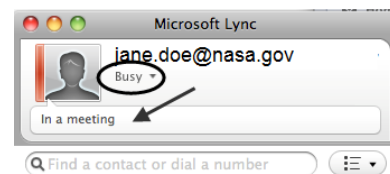
Availability Status in Lync

This section describes how to display your availability to others, and how to view the availability of others.

Lync Presence

Presence is a feature in Lync that indicates your availability to communicate with others. Indicate your status using any of these methods:

- When you schedule a meeting in your Outlook calendar, or are on a Lync call or video call, your status is automatically reflected in Lync.
- Use the Presence Status menu (shown at right) to select one of the following: Available, Busy, Do Not Disturb, Be Right Back, Off Work, Appear Away, Signed out.
- You can add additional information to the Presence status. In the example below, the Presence status indicates that Jane Doe is in a meeting.
 1. Place your cursor after the existing Presence status | Type your message, such as, “Will be free at 10:00.”
 2. Press enter.



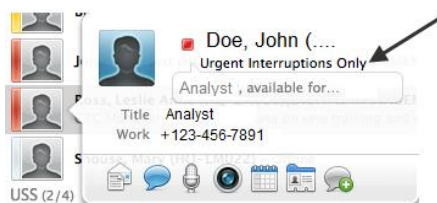
Check Contact's Lync Availability

Before communicating with a contact, you can check their availability to see if they are online, away, or unavailable.

You can view a contact's availability in one of two ways.



- The quickest way is to look at the color bar to the left of the contact's picture.
- To find additional details about a contact's availability, Ctrl+click on the contact's name | Select **View Contact Card**.

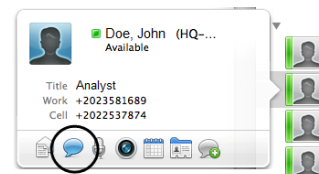
	Available
	Busy
	Offline
	Not Available



Lync Instant Messaging


Lync instant messaging (IM) is an efficient way to connect with your contacts in real time and on a moment's notice. It is less formal than e-mail and faster than a phone call. To send an IM, follow these steps:

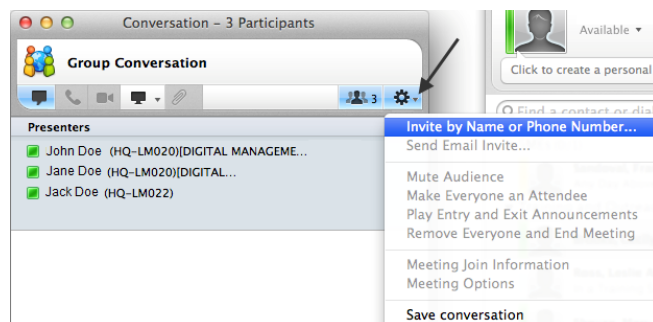
1. Check to see if your contact is available. If they are available, their picture  shows a green vertical bar. They will also have a label after their name saying, "Available."
2. Launch the conversation window by doing one of the following:
 - Click on the contact name | When the contact card appears, click the IM icon .
 - Double-click anywhere on their contact listing.
 - Right-click their listing and select **Send an Instant Message**.
3. Type your message at the bottom of the conversation window, changing font and adding emoticons as desired | Press **Enter**.



Send IM to Several Contacts at Once


To send an IM to several people at the same time, do the following:

1. Initiate an IM conversation with one of your contacts as described above.
2. Click the More Options  menu | Select **Invite by Name or Phone Number...**
3. Click on the contact you wish to add.
4. Their name appears under **Presenters** as shown at right.



Transfer Files

You can transfer files from peer to peer with Lync using one of these methods:

1. Drag and drop the file you want to share in the outgoing chat box.
2. At the top of the Conversation window, click the **Send a file** icon  and navigate to the file.

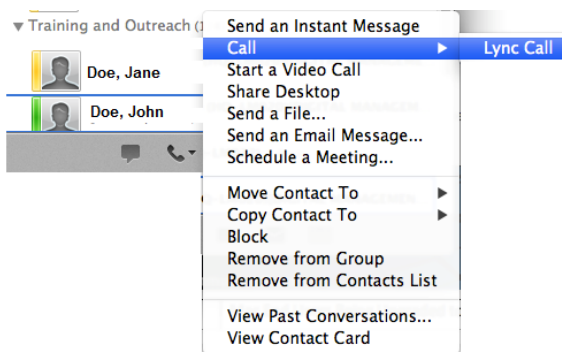
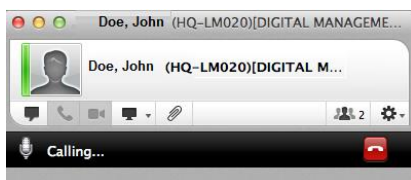
Make a Lync Call


A Lync call is from your computer to someone else's computer who is also using Lync (computer audio).

Lync does not have the ability to make an outside call. Lync calls are peer to peer; you cannot make a conference call.

To make a Lync call:

1. Click on the contact you wish to call.
2. Right-click | Select **Call** | **Lync Call**.



3. To end the conversation, click the red phone icon .


Meetings

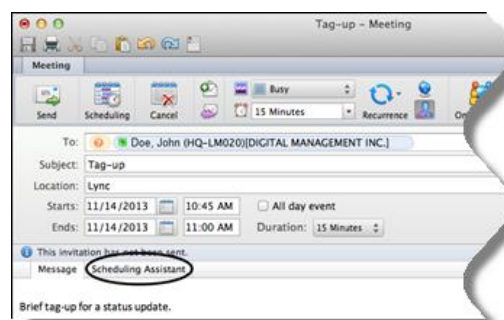
When you create a meeting using Lync, you can check if you have any scheduled meetings, search for people, view their schedules, invite people to a meeting you are just about to start, as well as schedule a meeting for the future just as you can in Outlook. A meeting that you create in Lync appears on your calendar in Outlook. Lync meetings are limited to 199 participants. To create an online meeting, you must have a VTS standard seat, which you can request through the [Enterprise Service Desk \(ESD\)](#).

Send Invitation for Outlook Meeting

To create a new meeting in Lync, go to the main Lync window and follow the steps below.

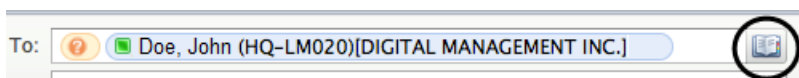


1. On the toolbar at the bottom, click the **Schedule a Meeting** icon .
2. When the **Meeting** window appears, enter the **Subject** text | **Starts** date and time | **Ends** date and time.



3. Add attendees by launching the **Contacts Search** window. There are two ways to do this:

- To the right of the **To:** text box, click the search icon , as shown below.

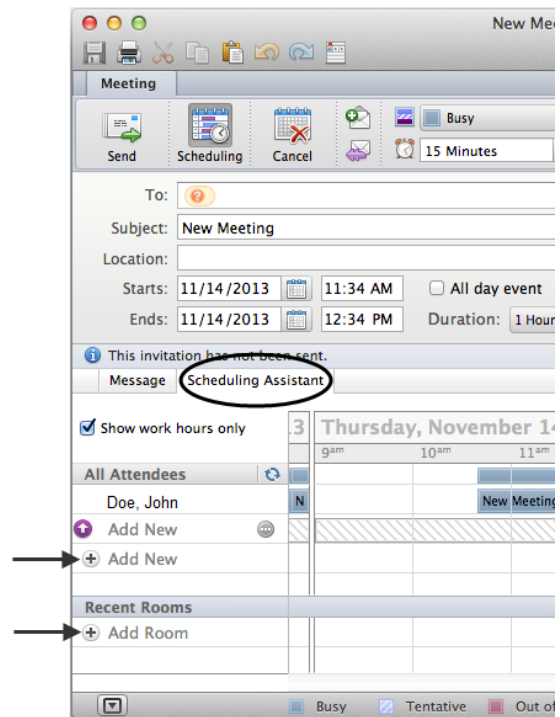
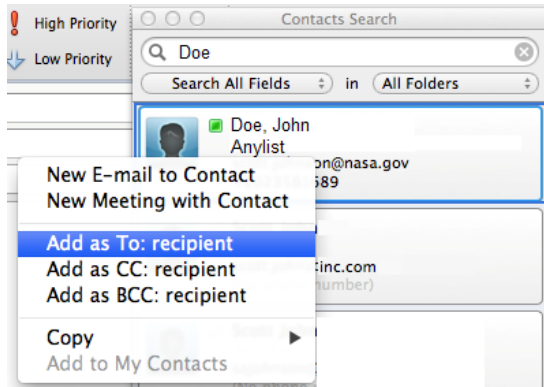


- Click the **Scheduling Assistant** tab (circled below), which allows you to check an attendee's schedule | Under **All Attendees**, click **Add New**.

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4. When the **Contacts Search** window appears, enter a name in the text box | Select the correct name from the search results | Do one of the following:


- Right-click | Select **Add as To: recipient**.

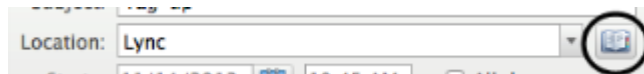


- At the bottom of the Contacts Search window, click either **Required**, or **Optional**.

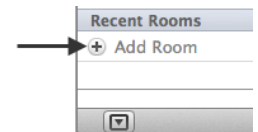


5. Launch the meeting Location Search window in one of three ways:

- On the **New Meeting** window, to the right of the **Location:** text box, click the search icon , as shown below.



- On the **New Meeting** window, on the **Scheduling Assistant** tab, under **Recent Rooms**, click **Add Room**, as shown at right.



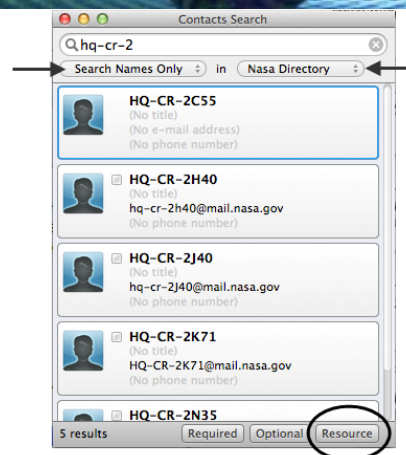
- On the **New Meeting** window, on the toolbar at the top, click the **Scheduling** icon .

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6. In the text box at the top, enter the name of the room you are requesting (as shown right)
7. For both of the menus, make the following selections:
 - Search Names Only
 - Nasa Directory

8. To add the room, click **Resource**, located at the bottom-right.

This adds the location to the **Location:** text box, and the room is listed as an invitee in the **To:** text box.

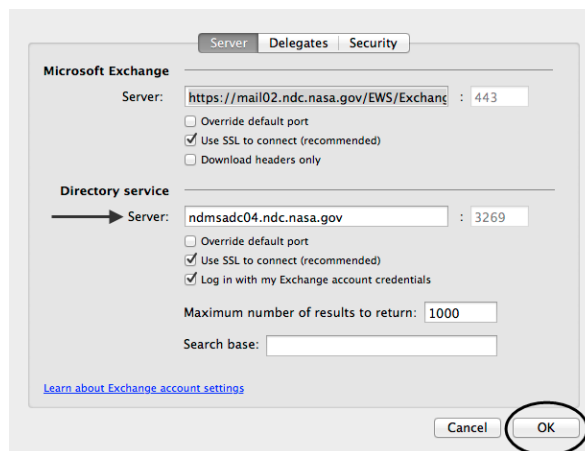


9. If your search:

Resulted in....	Then....
A No matches found message	Your Directory service server may be incorrect. Continue with the steps below to resolve this issue and then try your search again.
Was successful	Continue with step 16.








10. With your Outlook window active, click **Outlook | Preferences | Accounts | Advanced.**

11. Under Directory service, in the **Server:** text box, verify that the server name is:
ndmsadc04.ndc.nasa.gov
12. If it is not the same, delete the incorrect server name and replace it with the name in step two.
13. Ensure that all the other settings match the image to the right.
14. Click **OK**.
15. Try your search again.



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
16. Set the remaining options as appropriate:

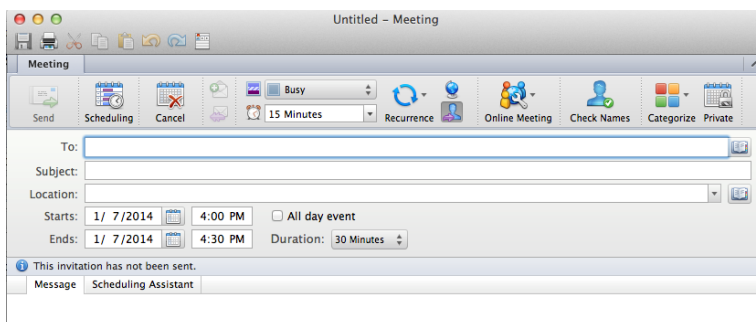
Icon	Description
	Use the Reminder menu to set a reminder for this meeting.
	Make this meeting recurring.
	Show time zone options
	Request that attendees indicate whether they plan to attend or not.
	Check Names icon: Verify names and address you typed to make sure you can send messages to them.
	Categorize icon: Assign to a category: Family, friends, holiday, junk, Manager, Networking, Personal, Red Category, and Team Travel. You can also add a new category, or edit an existing category.
	Private icon: Hide the contents of this meeting from others.


17. Click **Send** .

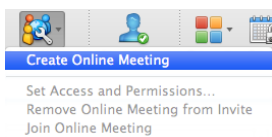
Create a Lync Online Meeting

To create a Lync online meeting with more than 15 internal people or external people, you must have a VTS standard seat, which you can request through the [Enterprise Service Desk \(ESD\)](#)..

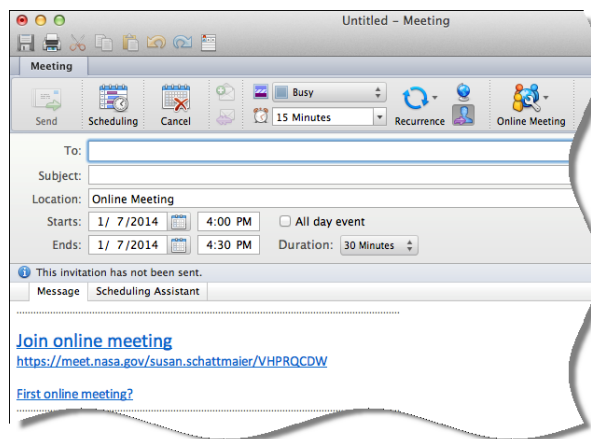
- From your Outlook calendar, click  **Meeting** to create a meeting.



- When the Outlook Meeting Invite window appears, as shown above, click  **Online Meeting** | Select **Create Online Meeting**.

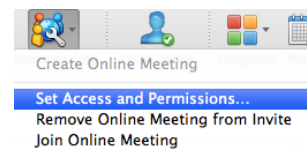


A link is inserted into an Outlook Meeting Invite, as shown at right.

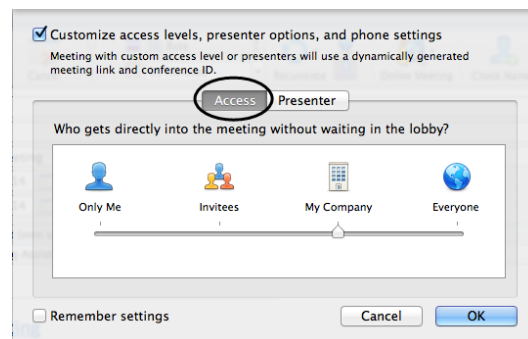


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3. Click  **Online Meeting** | Select **Set Access and Permissions**.

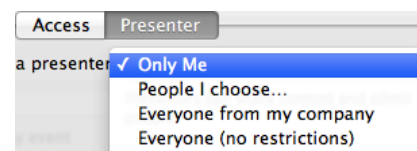


4. On the **Access** tab, under **Who gets directly into the meeting without waiting in the lobby?**, drag the slider to select the appropriate group: **Only Me**, **Invitees**, **My Company**, or **Everyone**.

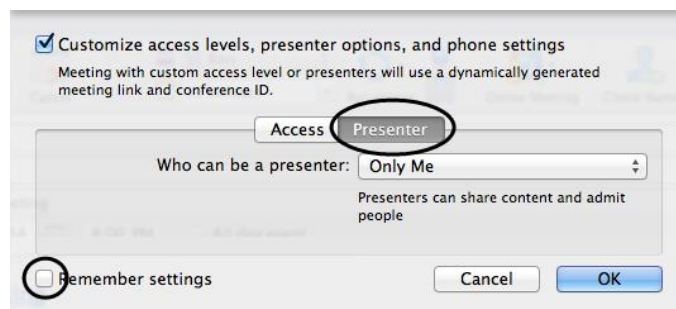


The default setting is anyone from My Company. Your organization's leadership can determine appropriate settings for your specific meeting and agenda. Best practice is to always check these settings to ensure the correct security is enabled. If you have a question about the appropriate security for your meeting, contact the Center Information Security Officer (CISO). For more information, visit <http://itcd.hq.nasa.gov/itsecurity/it-security.html>.

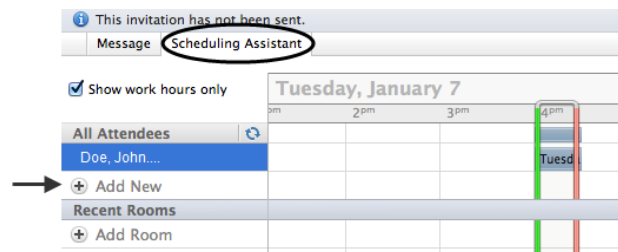
5. Click the **Presenter** tab to display permission options.
6. Next to **Who can be a presenter?**, make the appropriate selection: **Only Me**, **People I choose...**, **Everyone from my company**, **Everyone (no restrictions)**.



7. In the lower-left corner, click to select the checkbox **Remember settings** to set as default for future meetings.



8. In the Outlook Meeting window, enter the subject, date, and time for the Lync meeting.
9. Click the **Scheduling Assistant** tab to check an attendee's schedule.
10. Under **All Attendees**, click the +plus for **Add New**.



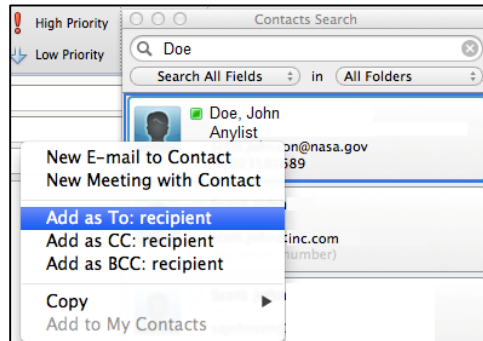
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11. When the **Contacts Search** window appears, enter a name in the text box.

A search result displays automatically.

12. Select the desired name from the search result and **Control+click** to do one of the following:

- Select Add as To: recipient
- Select Add as CC: recipient
- Select Add as BCC: recipient

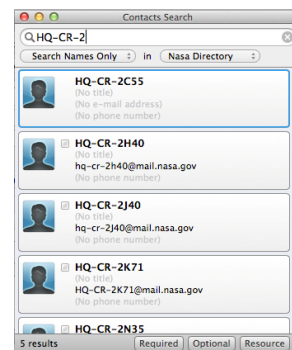









13. To the right of the **Location** field, click  **Search for rooms**

14. When the **Contacts Search** window appears, from the second menu, select **Nasa Directory** | Enter the name of the conference room using the naming convention HQ-CR- [Room Number].

15. From the list that appears, **Control + click** on the appropriate room | Select **Add as Resource**.

16. Set the remaining options as appropriate:




Icon	Description
	Use the Reminder menu to set a reminder for this meeting.
	Make this meeting recurring.
	Show time zone options
	Request that attendees indicate whether they plan to attend or not.
	Check Names icon: Verify names and address you typed to make sure you can send messages to them.
	Categorize icon: Assign to a category: Family, friends, holiday, junk, Manager, Networking, Personal, Red Category, and Team Travel. You can also add a new category, or edit an existing category.
	Private icon: Hide the contents of this meeting from others.

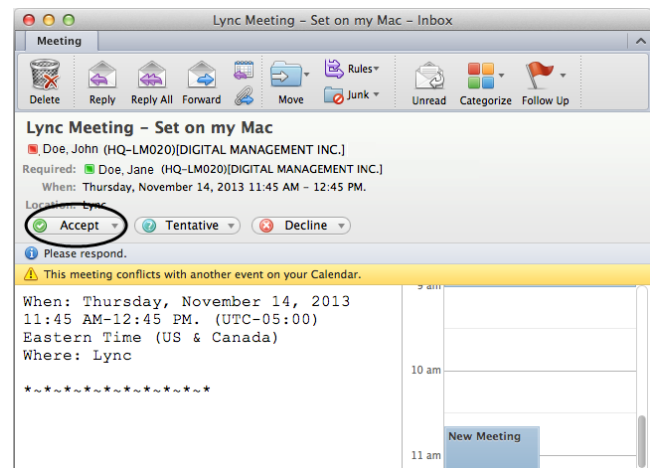
17. Click **Send**.

Lync Meeting Invite

When you receive a Lync meeting invite, click **Accept**. It now appears on your Outlook calendar.

At the time of your Lync meeting, you can access the meeting invitation using one of these methods:

- From the Outlook Calendar meeting, in the **Notes** section, click the **Join Lync Meeting** link.
→ [Join Lync Meeting](#)
- In Lync, click on the calendar icon  | Double-click the appointment.



Join a Lync Meeting

When joining a Lync Meeting, you can use a NASA computer with Lync installed, or a non-NASA computer without Lync using Outlook Webmail.

The meeting login steps vary depending on how the host set the options, and your participation in the meeting. You may be admitted directly to the meeting, or you may be prompted to log in to the meeting via the Web app.

Follow the steps for your situation:

[Join Meeting as NASA Employee Using NASA-Issued Macintosh Computer](#)

[Join Meeting as NASA Employee Using Non-NASA Computer](#)

[Join Meeting as Guest Using Non-NASA Computer](#)

If you are working from your NASA-issued Macintosh computer, the preferred method for logging in is using the Lync Client. This ensures you have all the rights of a NASA internal person and are considered internal to the meeting permissions.

NASA Employee Using NASA-Issued Macintosh Computer

To log in with your NASA-issued Macintosh computer using the Lync Client:

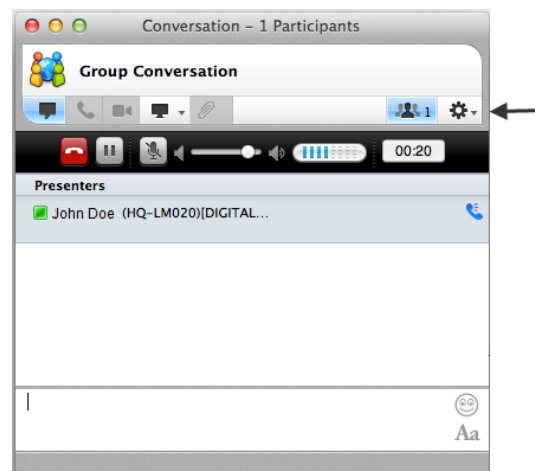
1. In Outlook, open the meeting invitation and click the **Join Lync Meeting** link.
→ [Join Lync Meeting](#)
2. Click **Join using Lync for Mac or Communicator for Mac**, as shown right.



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3. When the Lync for Mac 2011 client displays the meeting room, click the **Options**  icon to use the following features:

- Invite by Name or Phone Number...
- Send Email Invite...
- Mute Audience
- Make Everyone an Attendee
- Play Entry and Exit Announcements
- Remove Everyone and End Meeting
- Meeting Join information
- Meeting Options
- Save conversations



NASA Employee Using Non-NASA Computer

This method is preferred if you are an organizer or attendee without your NASA-issued laptop. To log in with the Lync Web App internet interface, follow these steps:

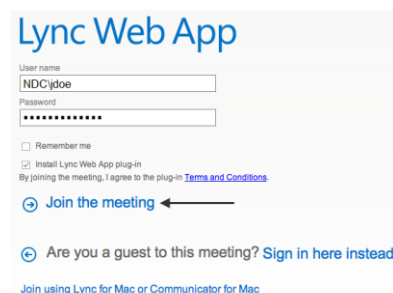
1. Connect remotely using [Secure Nomadic Access \(SNA\)](#) | Log into [Outlook Web Access \(OWA\)](#).
2. View the Calendar and open the e-mail meeting invitation | Click the **Join Lync Meeting** link in the meeting window.

→ [Join Lync Meeting](#)

3. When the Microsoft Lync Web App login Web page appears, click **Sign in if you are from the organizer's company**, as shown right.



4. In the **User name** field, enter the NASA network domain followed by your Agency User ID, as in the example: NDC\jdoe.
5. In the **Password** field, enter your password.
6. Click **Join the meeting**.



7. The first time you use Lync Web App, you are prompted to load a plug-in. Complete the download of the LWA Plugin64BitInstaller64 plugin.
Subsequent logins do not require you to download the plug-in. Just click **Allow**.
8. Click the checkbox next to **I have read the above and agree to the terms** | Click **Continue**.

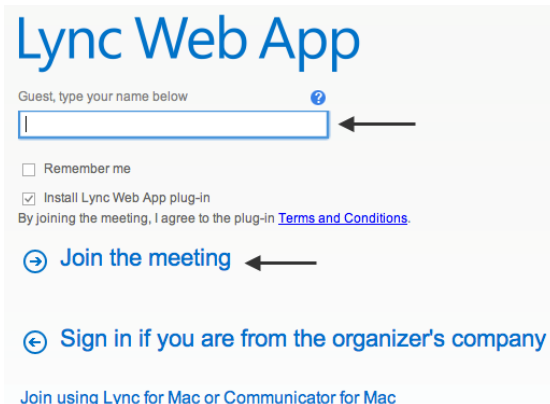
Guest Using Non-NASA Computer

Only non-NASA people should be using this option. If you log in as a guest, you are considered external to NASA and do not have the rights and privileges available to you if you were logged in using NASA credentials. To log in as a guest:

1. In your e-mail application, open the meeting invitation and click the **Join Lync Meeting** link.
2. The first time you use Lync Web App, you are prompted to load a plug-in. Complete the download of the LWA Plugin64BitInstaller64 plugin.

Subsequent logins do not require you to download the plug-in. Just click **Allow**.

3. After you've entered your name in the **Guest** field, click **Join the meeting**, as shown right.
4. When the Privacy Disclaimer displays, click the box next to **I have read the above and agree to the terms** | Click **Continue**.




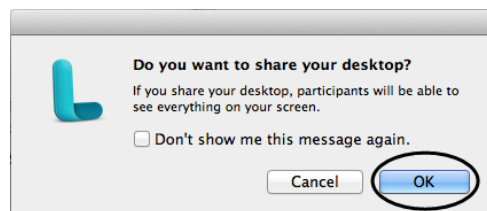
Presenting in a Lync Meeting Room

Use Lync to share your desktop or a program with contacts. Lync meetings are limited to 15 internal people without a VTS seat, or up to 199 internal or external participants with a VTS seat via a secure https Internet connection. To request a VTS standard seat, contact the [Enterprise Service Desk \(ESD\)](#). If you have more than 199 participants, Lync can support up to 1000 participants if you have elevated rights, which can be given on a meeting by meeting basis. To request elevated privileges for your meeting, submit a Service Request.

Share Desktop

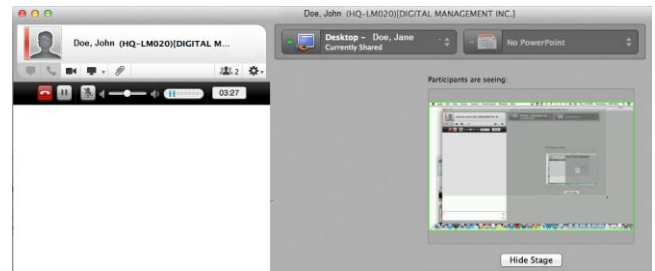
To share your desktop while in a conversation, follow these steps:

1. Click the Share content icon  as shown at right right | Select **Desktop** from the menu.
2. When a message appears informing you that people will be able to see everything on your screen, click **OK**.



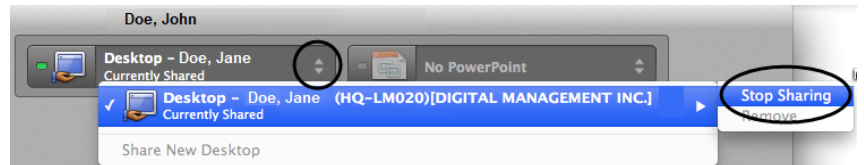
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The following screen appears indicating that you are now sharing your desktop. The image in the center right is what the other person can see.



3. To stop sharing your desktop, click the down arrow (circled below) | Select the desktop you would like stop sharing | Select **Stop Sharing**:

This returns you to your conversation.



PowerPoint Sharing

Macintosh users cannot upload a PowerPoint file for sharing from Lync. They can, however, open the PowerPoint on their desktop and share the desktop. They can also participate in a PowerPoint Presentation meeting that has been initiated from a Windows computer.

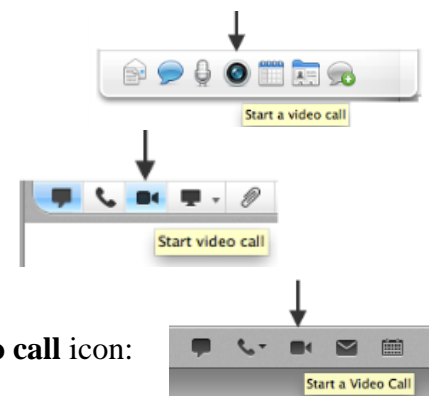
Windows Lync end users cannot see animations in PowerPoint during a PowerPoint sharing session presented by Lync for Mac end users. Instead of a PowerPoint sharing session, consider sharing your desktop and run the PowerPoint presentation with animations.

For information regarding obtaining a Lync Web conferencing account, contact the NASA [Enterprise Service Desk \(ESD\)](#) at (202) 358-HELP (4357) | Toll free: 1-866-4NASAHQ (462-7247).


Lync Video

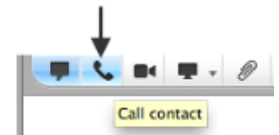
The Lync video functionality is available for Lync calls and messaging peer to peer. This functionality is not available using Conferencing. To use video during a conference, you must have an account.


1. There are a number of ways to initiate a Lync video chat in Macintosh:
 - Right-click on a contact name and select **Start a Video Call**.
 - Click once on contact picture | Click the **Start a video call** icon:
 - Double-click on a contact name | Click the **Start video call** icon.
 - Click once on a contact name to highlight it | Click the **Start a video call** icon:



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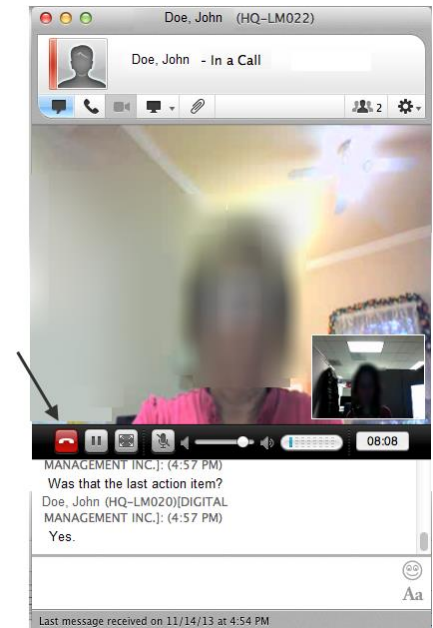
- While messaging with someone, click the **Call contact** icon on the messaging screen | Click the monitor icon  at the top of the screen.



2. To end your video chat, click the red phone icon .

For additional Lync documentation, visit:

<http://nomadinternal.nasa.gov/nomad/documentation.html>



For assistance, contact the Enterprise Service Desk (ESD): Submit a ticket online at esd.nasa.gov, or call 358-HELP (4357) or 1-866-4NASAHQ (462-7247).

This document is posted on the ITCD Web site at:
<http://itcd.hq.nasa.gov/instructions.html>